



America's Finest City

THE CITY OF SAN DIEGO



# **Assessment Engineer's Report**

## **CARMEL MOUNTAIN RANCH MAINTENANCE ASSESSMENT DISTRICT**

**Annual Update for Fiscal Year 2009**

**under the provisions of the**

**San Diego Maintenance Assessment District Ordinance  
of the San Diego Municipal Code**

**and**

**Landscaping & Lighting Act of 1972  
of the California Streets & Highways Code**

**Prepared For**

**City of San Diego, California**

**Prepared By**

**Boyle Engineering Corporation**

7807 Convoy Court, Suite 200  
San Diego, CA 92111  
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**June 2008**

# **CITY OF SAN DIEGO**

## **Mayor**

Jerry Sanders

## **City Council Members**

Scott Peters  
District 1 (Council President)

Kevin Faulconer  
District 2

Toni Atkins  
District 3

Anthony Young  
District 4

Brian Maienschein  
District 5

Donna Frye  
District 6

Jim Madaffer  
District 7 (Council President Pro Tem)

Ben Hueso  
District 8

## **City Attorney**

Michael Aguirre

## **Chief Operating Officer**

Jay Goldstone

## **City Clerk**

Elizabeth Maland

## **Independent Budget Analyst**

Andrea Tevlin

## **City Engineer**

Afshin Oskoui

## **Assessment Engineer**

Boyle Engineering Corporation

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## EXHIBITS

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Exhibit B: Estimated Annual Expenses, Revenues & Reserves

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# Assessment Engineer's Report Carmel Mountain Ranch Maintenance Assessment District

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## Preamble

Pursuant to the provisions of the "San Diego Maintenance Assessment District Ordinance" (being Division 2, Article 5, Chapter VI beginning at Section 65.0201 of the San Diego Municipal Code), provisions of the "Landscaping and Lighting Act of 1972" (being Part 2 of Division 15 of the California Streets and Highways Code), applicable provisions of "Proposition 218" (being Article XIID of the California Constitution), and provisions of the "Proposition 218 Omnibus Implementation Act" (being California Senate Bill 919) (the aforementioned provisions are hereinafter referred to collectively as "Assessment Law"), in connection with the proceedings for the CARMEL MOUNTAIN RANCH MAINTENANCE ASSESSMENT DISTRICT (hereinafter referred to as "District"), BOYLE ENGINEERING CORPORATION, as Assessment Engineer to the City of San Diego for these proceedings, submits herewith this report for the District as required by California Streets and Highways Code Section 22565.

FINAL APPROVAL, BY RESOLUTION NO. \_\_\_\_\_ ,  
ADOPTED BY THE CITY COUNCIL OF THE CITY OF SAN  
DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, ON THE  
\_\_\_\_\_ DAY OF \_\_\_\_\_, 2008.

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Elizabeth Maland, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

## Executive Summary

**Project:** Carmel Mountain Ranch  
Maintenance Assessment District

**Apportionment Method:** Equivalent Benefit Unit (EBU)

	<b>FY 2008</b>	<b>FY 2009 <sup>(1)</sup></b>	<b>Maximum <sup>(2)</sup> Authorized</b>
<b>Total Parcels Assessed:</b>	3,964	4,038	--
<b>Total Estimated Assessment:</b>	\$293,385	\$287,643	--
<b>Total Number of EBUs:</b>	12,013.82	11,778.68	--
<b>Assessment per EBU:</b>	\$24.42	\$24.42	\$26.75 <sup>(3)</sup>

<sup>(1)</sup> FY 2009 is the City's Fiscal Year 2009, which begins July 1, 2008 and ends June 30, 2009. Total Parcels Assessed, Total Estimated Assessment, and Total Number of EBUs may vary from prior fiscal year values due to parcel changes and/or land use re-classifications.

<sup>(2)</sup> Maximum authorized annual amounts subject to cost-indexing provisions as set forth in this Assessment Engineer's Report.

<sup>(3)</sup> Prior year's maximum authorized annual assessment increased by cost-indexing factor of 2.25%.

**Proposition 218 Compliance:** The District, originally established in October 1985, was re-engineered in Fiscal Year 1999 for compliance with Proposition 218. By a ballot proceeding, majority property owners (56.4% of the weighted vote) approved Fiscal Year 1999 assessments, maximum authorized assessments for subsequent years, and provisions for annual cost-indexing.

**Annual Cost-Indexing:** The maximum authorized assessment rate has been increased based on approved annual cost-indexing provisions.

**Bonds:** No bonds will be issued in connection with this District.

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## Background

The Carmel Mountain Ranch Maintenance Assessment District (District) generally includes the area bounded by Interstate 15 on the west, Camino del Norte to the north, and the City of San Diego/City of Poway boundary to the east and south. The District was established in October 1985 (see Resolutions Numbers R-261867 through R-261871) by area developers to provide for maintenance of certain paved and landscaped medians and streetscapes within its boundaries. Continued maintenance of these improvements is an important factor in the implementation and preservation of the "Community Environment, Conservation and Design Element" of the Carmel Mountain Ranch Community Plan, which "establishes a community identity through a consistent focus on topographic character and landscaping."

The improvements comprising the District consist of landscaped and paved medians, landscaped parkways and a limited number of landscaped slopes. The purpose of the District is to provide for the maintenance of these improvements. In Fiscal Year 1989 the District improvements were completed triggering the initial levy of District assessments.

The District was re-engineered in Fiscal Year 1999 for compliance with Proposition 218. The City of San Diego (City) retained Boyle Engineering Corporation (Boyle) and Lintvedt, McColl & Associates to prepare an Assessment Engineer's Report for the District. By a mail ballot proceeding, property owners approved the re-engineering with 56.4% of weighted votes supporting the proposed assessments.

The Assessment Engineer's Report, preliminarily accepted by Resolution Number R-290071 on May 11, 1998, proposed Fiscal Year 1999 assessments, maximum authorized assessments for subsequent years, and provisions for annual cost-indexing of the maximum authorized assessments.

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## District Proceedings for Fiscal Year 2009

This District is authorized and administered under the provisions of the "San Diego Maintenance Assessment District Ordinance" (being Division 2, Article 5, Chapter VI beginning at Section 65.0201 of the San Diego Municipal Code), provisions of the "Landscaping and

Lighting Act of 1972" (being Part 2 of Division 15 of the California Streets and Highways Code), applicable provisions of "Proposition 218" (being Article XIII D of the California Constitution), and provisions of the "Proposition 218 Omnibus Implementation Act" (being California Senate Bill 919) (the aforementioned provisions are hereinafter referred to collectively as "Assessment Law"). This report has been prepared in compliance with Assessment Law.

The purpose of the proposed proceedings and this Assessment Engineer's Report is to update the District budget and assessments for Fiscal Year 2009. The Fiscal Year 2009 assessments proposed within this Assessment Engineer's Report are equal to or less than the maximum authorized assessment. Therefore, the vote requirements of Section 4 of Article XIII D do not apply to these proceedings.

A public hearing will be scheduled where public testimony will be heard by the Council, and the Council may, at its discretion, adopt a resolution ordering the levying of the proposed assessments.

### **Bond Declaration**

No bonds will be issued in connection with this District.

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### **District Boundary**

The Boundary Map and Assessment Diagram for the District are on file in the Maintenance Assessment Districts section of the Park and Recreation Department of the City of San Diego and by reference are made a part of this report. The Boundary Map and Assessment Diagram for the District are available for public inspection during normal business hours. A reduced copy of the Boundary Map is included as Exhibit A.

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### **Project Description**

The project to be funded by the proposed assessments is the maintenance of landscaped street medians, paved street medians, landscaped rights-of-way and adjacent areas, curbs and gutters, slope areas and light fixtures. The approximate locations of these improvements are depicted in Exhibit A.

Maintenance includes, but is not limited to, these activities: tree and

shrub pruning; irrigation; maintenance and repair of irrigation systems; fertilization; pest control, fungicide or other special treatment; weed control; plant replacement; litter control; gutter sweeping; and cleaning and inspection of light fixtures.

The engineering drawings for the improvements to be maintained by the District are on file at Maps and Records in the Development Services Department and are incorporated herein by reference. The improvements and services provided by the District will be maintained in accordance with specifications and contracts on file with the Park and Recreation Department. These documents are available for public inspection during normal business hours.

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## **Separation of General and Special Benefits**

Consistent with City policy for the public at large, the City will provide the District with annual contributions from the Gas Tax Fund for median maintenance (31.89¢ per square foot of landscaped median and 13.04¢ per square foot of hardscaped median). These cost allocations, reviewed and adjusted annually by the City, are considered to be “general benefits” administered by the District. All other maintenance, operations, and administration costs associated with the District, which exceed the City’s contribution to the public at large, are accordingly considered to be “special benefits” funded by the District.

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## **Cost Estimate**

### **Estimated Costs**

Estimated Fiscal Year 2009 annual expenses, revenues, reserves, and assessments (provided by the City) are included as Exhibit B hereto.

### **Annual Cost-Indexing**

With the passage of Proposition 218, any proposed increase in assessments must be placed for approval before the property owners by a mail ballot and a public hearing process, similar to these proceedings. A majority of ballots received must be affirmative for the City Council to confirm and levy the increased assessments. For small assessment districts or districts with relatively low dollar assessments,



the cost of an engineer's report, balloting, and the public hearing process can potentially exceed the total cost of the increase. These incidental costs of the proceedings can be added to the assessments, resulting in even higher assessments.

Indexing assessments annually to the San Diego Consumer Price Index for Urban Consumers (SDCPI-U), as approved by the District property owners in Fiscal Year 1999, allows for minor increases for normal maintenance and operating cost escalation without incurring the costs of the Proposition 218 ballot proceedings. Any significant change in the assessment initiated by an increase in service provided or other significant changes to the District would still require the Proposition 218 proceedings and property owner approval.

The maximum authorized assessment established in the Fiscal Year 1999 proceedings are authorized to be indexed (increased or decreased) annually by the factor published in the SDCPI-U. The maximum authorized assessment rates contained within this Assessment Engineer's Report have been indexed in accordance with these cost-indexing provisions.

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## Method of Apportionment

### Estimated Benefit of Improvements

The Transportation Element of the City's General Plan and the general policy recommendations found in the Carmel Mountain Ranch Community Plan establish several goals for the community's transportation system. The improvements being maintained by this District are consistent with the plans' goals for safety and pleasing aesthetics.

The major and arterial streets within the District are the backbone of the street network within the community. They serve as the primary access routes for inter-community and intra-community trips and thus serve all parcels within the community. All parcels within the District benefit from the enhancement of these streets and the enhanced community image provided by the improvements being maintained by the District.

## Apportionment Methodology

The total cost for maintenance of the improvements funded by the District will be assessed to the various parcels in proportion to the estimated Equivalent Benefit Units (EBUs) assigned to a parcel, in relationship to the total EBUs of all the parcels in the District.

EBUs for each parcel have been determined as a function of three factors, a Land Use Factor, a Benefit Factor, and a Location Factor, related as shown in the following equation:

$$\text{EBUs} = (\text{Acres or Units}) \times \text{Land Use Factor} \times \text{Benefit Factor} \times \text{Location Factor}$$

Each of these factors is discussed below.

### Land Use Factor

Since the improvements to be maintained by the District are primarily associated with the Transportation Element of the General and Community Plans, trip generation rates for various land use categories (as previously established by the City's Transportation Planning Section) have been used as the primary basis for the development of Land Use Factors. While these trip generation rates strictly address only vehicular trips, they are also considered to approximately reflect relative trip generation for other modes of transportation (e.g., pedestrian trips, bicycle trips, etc.), and are considered the best available information for these other transportation modes.

The special benefits of landscape improvements maintained by the District are linked to trip generation primarily by the public safety and aesthetic enhancement enjoyed by travelers through the community. Trip generation rates provide the required nexus and basis for assigning ratios of maximum potential benefit to the various land use/zoning classifications as defined by the City's Municipal Code.

Land use/zoning classifications have been grouped with averaged trip generation rates assigned to establish the Land Use Factors as shown in Table 1.

**TABLE 1: Land Use Factors**

<b>Land Use/Zoning</b>	<b>Code</b>	<b>Land Use Factor</b>
Residential – Detached Single Family	SFD	1.0 per dwelling unit
Residential – Condominium (Attached)	CND	0.7 per dwelling unit
Residential – Multi-Family & Apartment	MFR	0.7 per dwelling unit
Commercial – Office & Retail	COM	45.0 per acre
Educational – Primary & Secondary	EPS	5.0 per acre
Fire/Police Station	FPS	15.0 per acre
Golf Course	GLF	0.8 per acre
Hospital/Medical Facility	HMF	30.0 per acre
Hotel	HTL	15.0 per acre
Industrial	IND	15.0 per acre
Library	LIB	40.0 per acre
Open Space (designated)	OSP	0.0 per acre
Park – Developed	PKD	5.0 per acre
Post Office	PST	15.0 per acre
Recreational Facility	REC	3.0 per acre
Street/Roadway	STR	0.0 per acre
Undevelopable	UND	0.0 per acre
Utility Facility	UTL	3.0 per acre

Designated Open Space serves primarily to preserve natural landscape and habitat. While access for study and passive recreation is sometimes permitted, these activities are usually allowed only to the limited extent consistent with the primary purpose of natural preservation. Since this land is essentially “unused” in the customary terms of land use (which relate to human use, not use by nature), the trip generation rate is zero, therefore, the designated Open Space receives no benefit from the Transportation Element and has been assigned a Land Use Factor of zero.

While those traveling streets and roadways enjoy the improvements maintained by the District during their travel, the actual benefit of this enjoyment accrues to the lands at the origins and destinations of their trips, not to the lands of the streets and roadways, themselves. Accordingly, parcels in the Street/Roadway

category receive no benefit and have been assigned a Land Use Factor of zero.

The Utility Facility category applies to utility infrastructure facilities, such as water tanks, pump stations, electric power transformer stations, etc. Utility company administrative offices are not included in this category.

Zoning regulations allow some Commercial uses in areas of the District that are zoned Industrial. In those areas, parcels were categorized by their apparent *usage*, rather than strictly by their zoning designation.

### ***Benefit Factor***

The Land Use Factor described above reflects the relative intensity of use (or potential use) of the various parcels of land to be assessed. It does not address the relationship of this use to the specific improvements to be maintained by the District. This relationship is reflected in the Benefit Factor utilized in the assessment methodology.

In determining the Benefit Factor for each land use category, the subcomponents of the benefits of District improvements considered may include some or all of the following: public safety, view corridors and aesthetics, enhancement of community identity, drainage corridors, and recreational potential. As Benefit Factors and their subcomponents are intended to reflect the particular relationships between specific land uses within a district and the specific improvements maintained by the district, Benefit Factors will generally vary from one district to another, based on the specific character and nature of the applicable land uses and improvements maintained.

The applicable benefit subcomponents and resultant composite Benefit Factors determined for the various Land Use/Zoning categories within this District are as shown in Table 2.

**TABLE 2: Benefit Factors by Land Use**

<b>Land Use/Zoning</b>	<b>Public Safety (max. 0.3)</b>	<b>Aesthetics (max. 0.7)</b>	<b>Composite Benefit Factor (max. 1.0)</b>
Residential – All	0.3	0.7	1.0
Commercial – Office & Retail	0.3	0.5	0.8
Educational	0.3	0.3	0.6
Fire/Police Station	0.3	0.5	0.8
Golf Course	0.3	0.1	0.4
Hospital/Medical Facility	0.3	0.3	0.6
Hotel	0.3	0.5	0.8
Industrial	0.3	0.3	0.6
Library	0.3	0.3	0.6
Open Space (designated)	0.3	0.1	0.4
Park – Developed	0.3	0.1	0.4
Post Office	0.3	0.5	0.8
Recreational Facility	0.3	0.3	0.6
Street/Roadway	0.3	0.1	0.4
Undevelopable	0.3	0.1	0.4
Utility Facility	0.3	0.1	0.4

**Public Safety.** All land uses are considered to receive the maximum available benefit from the public safety element of District improvements. Public safety is essential to all land uses, and even to lands, such as designated Open Space, held in stewardship with only incidental human use.

**Aesthetics.** The degree of benefit received from the aesthetic qualities of landscaped and hardscaped roadway medians and rights-of-way maintained by the District varies among land use categories. Generally, by nature of their use, residential lands receive the greatest benefit from the reduced traffic congestion, reduced noise levels, greater separation from traffic and generally more tranquil environment provided by landscaped and hardscaped roadway medians and rights-of-way. Commercial and institutional uses, on the other hand, often thrive on higher densities, greater traffic access, and a higher level of activity in the vicinity of their enterprises. These uses, accordingly, receive a lesser degree of

benefit from the general insulation and separation provided by the aesthetic elements of District improvements.

Lands in the Open Space, Street/Roadway, and Utility Facility categories are considered to receive no significant benefit from the aesthetic elements of District improvements, as enhanced aesthetic quality of other lands in their vicinity does not affect their function, use, or value. Lands in the Golf Course and Park categories are considered to receive no significant benefit from the aesthetic elements of District improvements, as the aesthetic values of these lands are themselves so high that they are little enhanced by those of other lands in their vicinity.

### **Location Factor**

The Location Factor considers the location of the parcels to be assessed relative to the location of District improvements. Since all parcels in this District may make use of any of the District Improvements in the trips generated by their uses, all parcels in the District are being assigned the same Location Factor of 1.

**TABLE 3: Location Factors by Zone**

Zone	Location Factor	
	FY 2009	Max. Authorized
Zone 1 (ALL)	1.00	1.00

### **Equivalent Benefit Units (EBUs)**

As described above, the number of Equivalent Benefit Units (EBUs) attributable to each parcel in the District has been calculated, based on the preceding factors, as follows.

$$\text{EBUs} = (\text{Acres or Units}) \times \text{Land Use Factor} \times \text{Benefit Factor} \times \text{Location Factor}$$

Based on the above formula, the EBUs calculated for each property, can be found in the Assessment Roll (Exhibit C).

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## Summary Results

The District Boundary is presented in Exhibit A.

An estimate of the costs of the improvements provided by the District is included as Exhibit B to this report.

The assessment methodology utilized is as described in the text of this report. Based on this methodology, the EBUs and Fiscal Year 2009 District assessment for each parcel were calculated and are shown in the Assessment Roll (Exhibit C).

Each lot or parcel of land within the District has been identified by unique County Assessor's Parcel Number on the Assessment Roll and the Boundary Map and Assessment Diagram referenced herein. The net assessment for each parcel for Fiscal Year 2009 can be found on the Assessment Roll.

This report has been prepared and respectfully submitted by:

BOYLE ENGINEERING CORPORATION

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Eugene F. Shank, PE

C 52792

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Carolyn R. Crull

I, \_\_\_\_\_, as CITY CLERK of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the Assessment as shown on the Assessment Roll, together with the Assessment Diagram, both of which are incorporated into this report, were filed in my office on the \_\_\_\_ day of \_\_\_\_\_, 2008.

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Elizabeth Maland, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

I, \_\_\_\_\_, as CITY CLERK of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the foregoing Assessment, together with the Assessment Diagram incorporated into this report, was approved and confirmed by the CITY COUNCIL of said City on the \_\_\_\_ day of \_\_\_\_\_, 2008.

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Elizabeth Maland, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

I, \_\_\_\_\_, as CITY ENGINEER of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the foregoing Assessment, together with the Assessment Diagram was recorded in my office on the \_\_\_\_ day of \_\_\_\_\_, 2008.

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Afshin Oskoui, CITY ENGINEER  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

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# **EXHIBIT A**

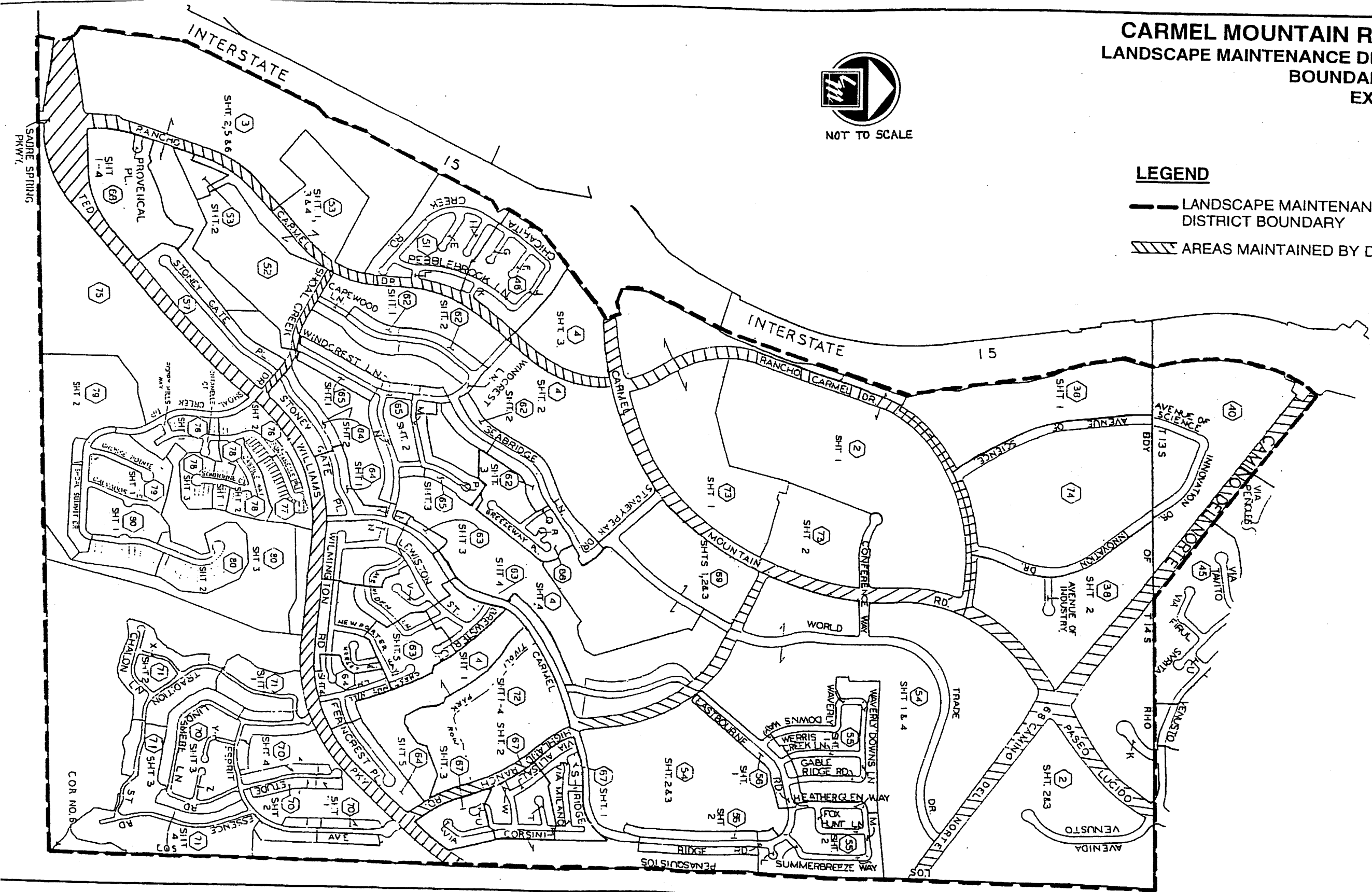
CARMEL MOUNTAIN RANCH  
LANDSCAPE MAINTENANCE DISTRICT  
BOUNDARY MAP  
EXHIBIT A



NOT TO SCALE

LEGEND

- LANDSCAPE MAINTENANCE DISTRICT BOUNDARY
- AREAS MAINTAINED BY DISTRICT



# **EXHIBIT B**

# EXHIBIT B - Estimated Annual Expenses, Revenues & Reserves

Carmel Mountain Ranch - Fund No. 70233

	FY 2007 BUDGET	FY 2008 BUDGET	FY 2009 BUDGET
<b>BALANCE FROM PRIOR YEAR</b>	\$ 239,405	\$ 260,129	\$ 272,741
<b>REVENUE</b>			
Assessments	\$ 293,337	\$ 293,385	\$ 287,643
Interest	\$ 4,000	\$ 6,000	\$ 7,000
Environmental Growth Fund	\$ -	\$ -	\$ -
Gas Tax Fund	\$ 80,050	\$ 88,192	\$ 88,145
General Fund	\$ -	\$ -	\$ -
Miscellaneous	\$ -	\$ -	\$ -
<b>TOTAL REVENUE</b>	<b>\$ 377,387</b>	<b>\$ 387,577</b>	<b>\$ 382,788</b>
<b>TOTAL BALANCE AND REVENUE</b>	<b>\$ 616,792</b>	<b>\$ 647,706</b>	<b>\$ 655,529</b>
<b>EXPENSE</b>			
<b>OPERATING EXPENSE</b>			
Personnel	\$ 26,105	\$ 27,362	\$ 28,047
Contractual	\$ 328,297	\$ 306,804	\$ 309,799
Incidental	\$ 37,339	\$ 34,203	\$ 36,377
Utilities	\$ 50,849	\$ 56,982	\$ 70,937
<b>TOTAL OPERATING EXPENSE</b>	<b>\$ 442,590</b>	<b>\$ 425,351</b>	<b>\$ 445,160</b>
<b>RESERVE</b>			
Contingency Reserve	\$ 193,307	\$ 222,355	\$ 210,369
<b>TOTAL RESERVE</b>	<b>\$ 193,307</b>	<b>\$ 222,355</b>	<b>\$ 210,369</b>
<b>BALANCE</b>	<b>\$ (19,105)</b>	<b>\$ 0</b>	<b>\$ 0</b>
<b>TOTAL EXPENSE, RESERVE AND BALANCE</b>	<b>\$ 616,792</b>	<b>\$ 647,706</b>	<b>\$ 655,529</b>

# **EXHIBIT C**

Due to the size of the Assessment Roll (Exhibit C), only limited copies are available. Please contact the City of San Diego, Park & Recreation Department, Open Space Division, Maintenance Assessment Districts Program at (619) 685-1350 to review the Assessment Roll.